

CRM ACTIVITIES

TODAY'S ACTIVITIES

This is a list of Activities that are due **today** , that you can follow up on and action directly.

As you work through your activities and complete them, they will be **removed** from the list.

All activities that were due on the current day, but not actioned, will show up in your **Warnings** the following day.

Ribbon Access: Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

SELECT THE TODAY TAB

1. In the **Dashboard** (Home page) screen,
2. Ensure that the **Today** tab is selected to be able to view the day's activities.

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a 'Dashboard' menu, a search bar, and three main sections: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. The 'Activities for Last 30 Days' section contains a table with columns for Description, Target, Existing Custmrs, and New Custmrs. The '1 Month Performance' section shows a bar chart for Cases, Invoices, Orders, and Quotes. The '4 Month Pipeline' section shows a bar chart for Jul 2019, Aug 2019, Sep 2019, and Oct 2019. Below these are several action buttons: 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'equipment', and '3rd party'. A list of activities is displayed, including 'Email - Networking and Laptops: Email product brochure' and 'Phone call - King Enterprises: Phone call to discuss present client requirements and give overview of new product range.' Each activity has a 'Schedule Date' and 'Status' column. The 'warnings' button is highlighted with a red circle and a blue arrow pointing to the 'warnings' button in the activity list.

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	1
Email	0	0	0
Meeting	0	0	0
On Site inspection	0	0	1
Site inspection	2	0	0

DISPLAY THE ACTION BUTTONS

1. Hover over an activity to display **Action** buttons:
 - **View / Edit this Activity**
 - **Reschedule this Activity**
 - **View Case info and history**
 - **Close this case**
 - **Next Action** (close current activity and create new activity)
 - **View customer**
2. Hover over any of these to bring up a **button description** text box.

The screenshot shows the bpo CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a search bar, a 'Dashboard' title, and three main sections: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'.

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	1
Email	0	0	0
Meeting	0	0	0
On Site inspection	0	0	1
Site inspection	2	0	0

1 Month Performance

Bar chart showing performance for Cases, Invoices, Orders, and Quotes from July to September 2019.

4 Month Pipeline

Bar chart showing pipeline values for Jul 2019, Aug 2019, Sep 2019, and Oct 2019.

Activity List

Activity	When	Who	Cell	Bus
Email - Networking and Laptops: Email product brochure.	22 Jul 2019, 15:00-16:00	John Jackson, Networking and Laptops	031 123 4567	
Phone call - King Enterprises: Phone call to discuss present client requirements and give overview of new product range.	22 Jul 2019, 13:00-14:00	Jason King, King Enterprises	0123456789	

The 'Next Action' button is highlighted with a red box and a '2' in a circle. A '1' in a circle points to the first activity in the list.

ACTIVITY QUICK VIEW SUMMARY

1. **Single click** on any activity in this screen,
2. To access a **quick view summary** of the activity information.

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. It features a search bar, a table of activities for the last 30 days, and three performance charts: '1 Month Performance' (Cases, Invoices, Orders, Quotes), '4 Month Pipeline' (Jul 2019, Aug 2019, Sep 2019, Oct 2019), and a grid of activity counts (create cold call, recommendations, warnings, customers, cases, activities, quotes, equipment, 3rd party). A list of activities is shown below, with details for two items:

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	1
Email	0	0	0
Meeting	0	0	0
On Site Inspection	0	0	1
Site Inspection	2	0	0

1 Month Performance

Category	Value
Cases	~4000.00
Invoices	~12000.00
Orders	~6000.00
Quotes	~6000.00

4 Month Pipeline

Month	Value
Jul 2019	~4000.00
Aug 2019	~1000.00
Sep 2019	~1000.00
Oct 2019	~1000.00

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	1
Email	0	0	0
Meeting	0	0	0
On Site Inspection	0	0	1
Site Inspection	2	0	0

Activity Details:

- Email - Networking and Laptops: Email product brochure**
 - When: 22 Jul 2019, 15:00-16:00
 - Who: John Jackson, Networking and Laptops
 - Tel: [Redacted]
 - Email: [Redacted]
 - Cell: 031 123 4567
 - Bus: 031 123 4567
 - Where: PO Box 1234 Forest Hills New Town Durban KZN
 - Case: Call client to discuss new product range
 - Comments: Client interested in multi-functional copiers
 - Completion Notes: [Redacted]
- Phone call - King Enterprises: Phone call to discuss present client requirements and give overview of new product range.**
 - When: 22 Jul 2019, 13:00-14:00
 - Who: Jason King, King Enterprises
 - Tel: [Redacted]
 - Email: [Redacted]
 - Cell: 0123456789
 - Bus: 0123456789

NAVIGATE TO CUSTOMER DASHBOARD

- Click on the blue link in the **Who** field of any of the activities.

The screenshot displays the CRM interface for 'Example Company' with user 'Abigail Milne'. The dashboard includes:

- Activities for Last 30 Days:**

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	1
Email	0	0	0
Meeting	0	0	0
On Site inspection	0	0	1
Site inspection	2	0	0
- 1 Month Performance:** Bar chart showing Cases, Invoices, Orders, and Quotes.
- 4 Month Pipeline:** Bar chart showing revenue from Jul 2019 to Oct 2019.
- Links Panel:** Tiles for 'create co/d call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'equipment', and '3rd party'.
- Activity List:**
 - Email - Networking and Laptops: Email product brochure**
 - When: 22 Jul 2019, 15:00-16:00
 - Who: [John Jackson, Networking and Laptops](#)
 - Tel: [Redacted]
 - Email: [Redacted]
 - Cell: [Redacted]
 - Bus: 031 123 4567
 - Phone call - King Enterprises: Phone call to discuss present client requirements and give overview of new product range.**
 - When: 22 Jul 2019, 13:00-14:00
 - Who: Jason King, King Enterprises
 - Tel: [Redacted]
 - Email: [Redacted]
 - Cell: [Redacted]
 - Bus: 0123456789

1. The selected **Customer Dashboard** screen will be displayed.
2. Here you can view the **Customer / Company details** and **12 Months Sales History**.
3. A panel of **Links** tiles can direct you to further information regarding this customer.

CRM Example Company
Abigail Milne

Customer Dashboard 1
 Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	1
Email	120	0	0
Meeting	40	0	0
On Site inspection	50	0	1
Site inspection	2	0	0

1 Month Performance

4 Month Pipeline

create odd call

recommendations

warnings

customers

cases

activities

quotes

orders

invoices

credit notes

equipment

contracts

service calls

3rd party

files

Networking and Laptops - NET001

Trading Name: Networking and Laptops Inc. 50%

Registered Name: Networking and Laptops

Description: [Blank]

VAT No: 123456789

Registration: 987654321

Rank: Metal

Website: <http://www.net.co.za>

Phone: 031 123 4567

12 Months Sales History

Integration Application
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